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Netherlands

Food Service - Hotel Restaurant Institutional

An overview of the HRI Market in the Netherlands and Belgium

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Report Highlights:

This report gives an overview of the food service industry and its various sectors within the Netherlands and Belgium. It provides an understanding of the key channels of distribution for foods and beverages destined for food service. It identifies the major players as well as giving contact information for all the main groups within the industry. Healthy, organic food and sustainable food products have excellent sales potential, while the market remains receptive for new U.S. products.

Introduction

The Foodservice – Hotel Restaurant Institutional (HRI) report provides an important road map for exporters of U.S. products who wish to enter the food service market in the Netherlands and Belgium. Furthermore they will gain an understanding of the key channels of distribution for foods and beverages destined for food service. The report summarizes key sector developments, provides market opportunities, identifies distribution channels, provides sub-sector profiles, and describes the competitive situation and best products prospects.

Description and Comparison of the Consumer Foodservice Sub Sectors

The Benelux consumer foodservice sector covers cafés/bars, fast-food outlets, full service restaurants, 100% home delivery/takeaway, self-service cafeterias, street stalls/kiosks and pizza consumer foodservice.

Cafés/bars: This sector encompasses all establishments where the focus is on drinking both alcoholic or non-alcoholic beverages and where food is also served. While a wide variety of snacks and full meals are offered, it is not uncommon for customers to only order a drink. Cafés/bars includes bars/pubs, cafés, juice/smoothie bars, and specialist coffee shops.

Fast food outlets: Fast food outlets are typically distinguished by the following characteristics: a standardized and restricted menu; food for immediate consumption; tight individual portion control on all ingredients and on the finished product; individual packaging of each item; a young and unskilled labor force; counter service. For chained fast food, chained and franchised operations which operate under a uniform fascia and corporate identity.

Full-service restaurants: Full-service Restaurants encompass all sit-down establishments where the focus is on food rather than on drink. It is characterized by table service and a relatively higher quality of food offering. It also includes à la carte, all-you-can-eat and sit-down buffets within restaurants. Restaurants at resorts and hotels are in general categorized as Full-service Restaurants.

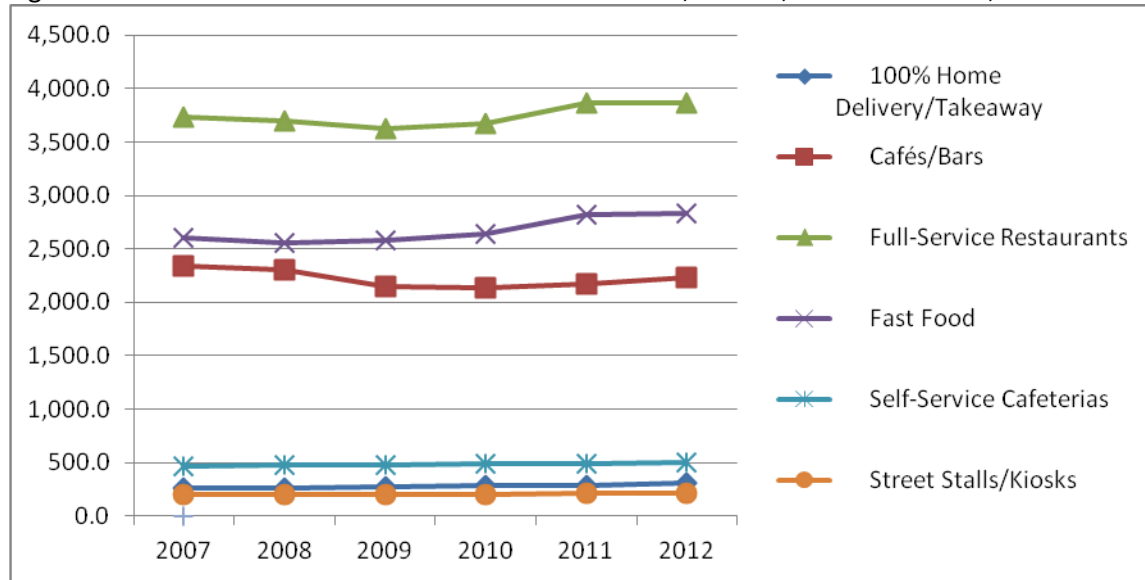
100% home delivery/takeaway: Fixed units which provide no facilities for consumption on the premises. Food can either be picked up by the consumer, or delivered, often for an additional charge. Common offerings include: pizzas, Chinese, Indian, Mexican, and other local national offerings. 100% home delivery/takeaway differ from street stalls/kiosks in that outlets tend to be more permanent, often with more elaborate on-site cooking facilities, including ovens. Menus tend to be larger and more meal-based, with street vendors more often specializing in snacks or a particular dish.

Self-service cafeterias: They provide no (or limited) service content. Food is presented on counters or available made-to-order through food stalls. The customer chooses the items they want and pays for everything at a separate pay station or check-out.

Street stalls/Kiosks: Small, mobile foodservice providers characterized by a very limited product offering and by low prices. Includes street hawker and larger branded complexes, for example in Asia-Pacific. Also includes kiosks and carts located externally or internally e.g. shopping malls.

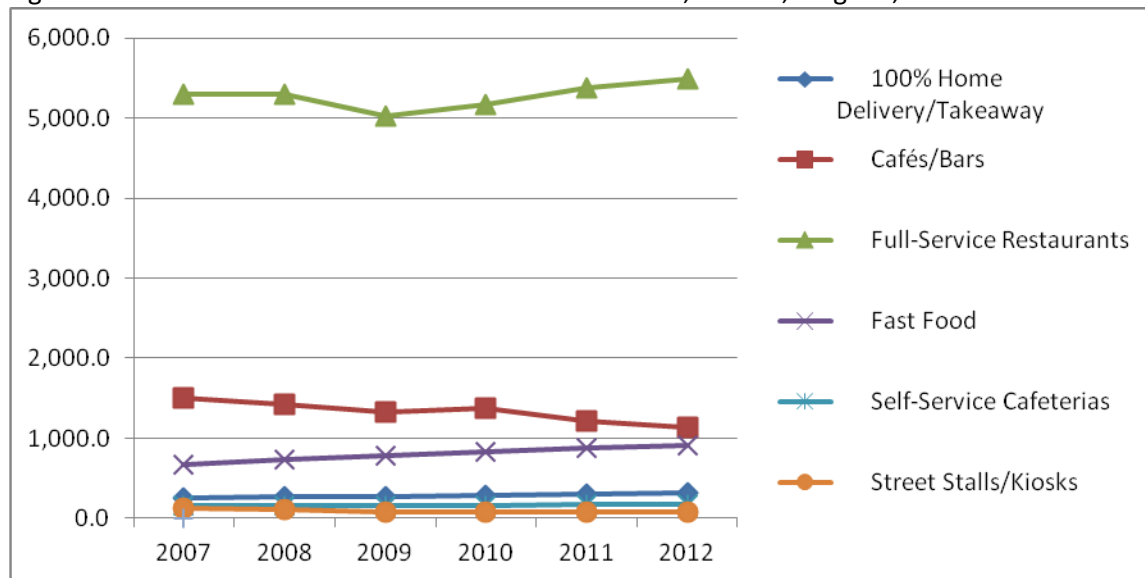
Value Of The Overall Benelux HRI Industry And Sub-Sectors, Past 5 years

Figure 1: value of The Consumer Foodservice sub sectors, in euro, the Netherlands, 2007-2012



Source: Euromonitor

Figure 2: value of The Consumer Foodservice sub sectors, in euro, Belgium, 2007-2012



Source: Euromonitor

The turnover of the Belgian consumer foodservice industry is stable around \$10.6 billion¹. After declining sales in 2008 and 2009, especially in the cafés/bars and full-service restaurants, the industry seems to be on the road of recovery. Full service restaurants, fast-food outlets and cafés/bars dominate the Dutch HRI industry.

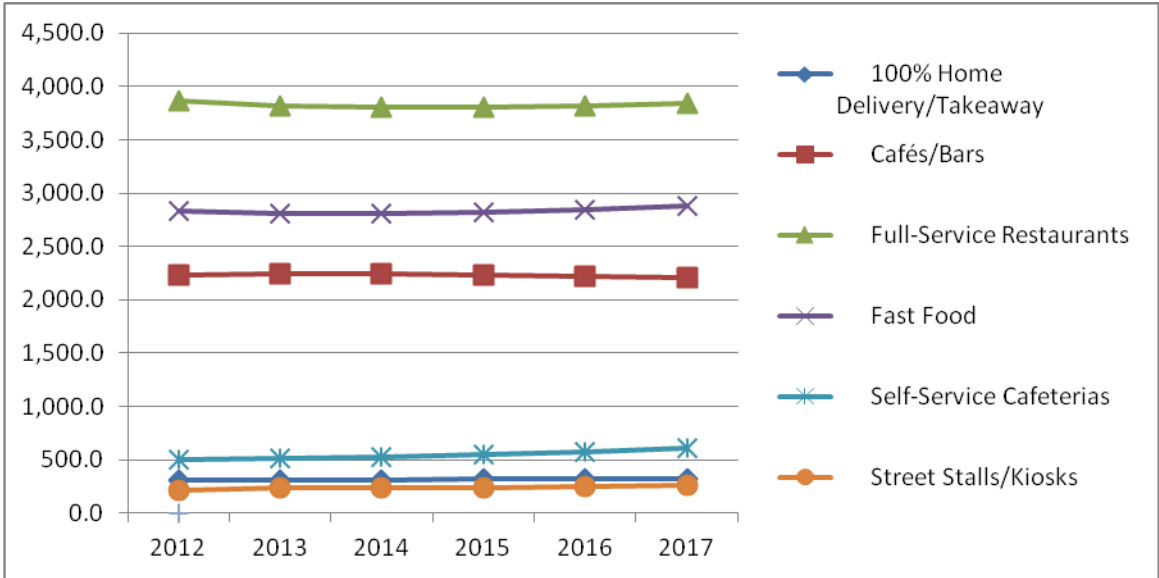
The Dutch consumer foodservice industry is also recovering from disappointing results in 2008 and 2009. Especially the full-service restaurants and fast food outlets have demonstrated strong growth since 2010. The

¹ 1\$=0.758€

turnover of cafés/bars however, declined by a quarter, past 5 years. Last year, the turnover of the Dutch consumer foodservice industry reached \$13.1 billion.

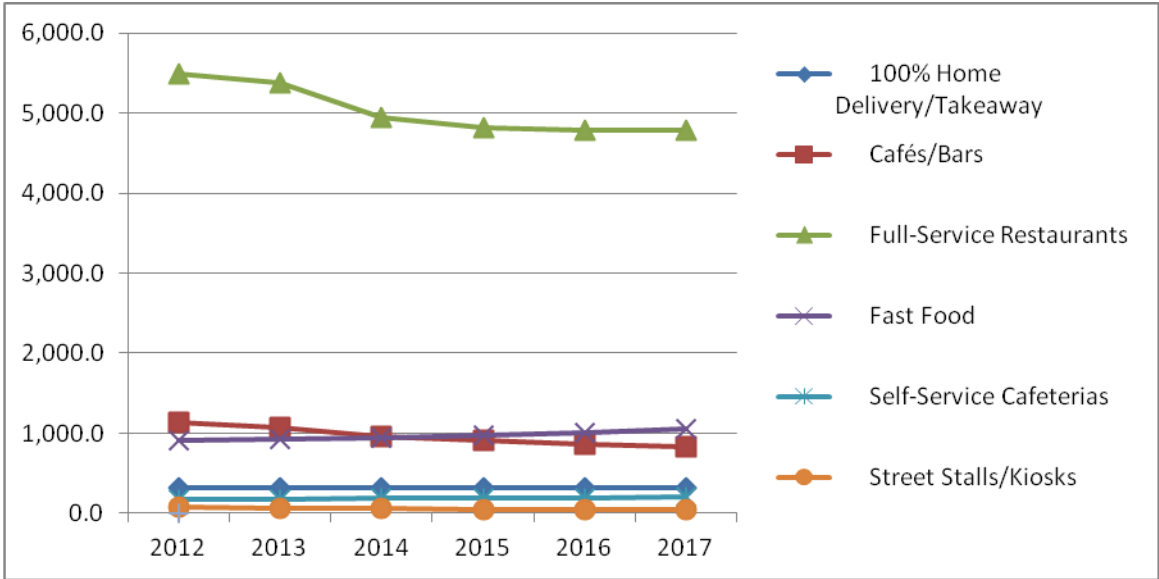
Expected Growth Rates of the Benelux Consumer Foodservice Industry and Its Sub-Sectors, Coming Years

Figure 3: expected value of The Consumer Foodservice sub sectors, in euro, the Netherlands, 2012-2017



Source: Euromonitor

Figure 4: expected value of The Consumer Foodservice sub sectors, in euro, Belgium, 2012-2017



Source: Euromonitor

The consumer foodservice industry in Belgium is forecasted to decline by almost 11 percent to \$9.5 billion in 2017. The main reason behind this is the declining sales in cafés/bars and full service restaurants. The Dutch market for consumer foodservice is forecasted to stabilize coming years around \$13.2 billion. The fast food industry is forecasted to grow slightly in both markets.

Number and Type of Benelux HRI Establishments

Between 2007 and 2012, the number of foodservice outlets decreased in both Belgium (-12 percent) and the Netherlands (-3 percent). The declining number of outlets was especially noticeable in cafés/bars and street stalls/kiosks in Belgium.

The Full service restaurants and cafés/bars are the largest sectors in terms of number of establishments, accounting together for three quarter of all outlets. Fast food is the third largest sector.

Value of Imported Food versus Domestic Products over the Past 5 Years

The Dutch agricultural sector benefits from Holland's mild climate, fertile soil and favorable geographical location in Europe. Expertise, infrastructure, the food processing industry, commerce and logistics are all advanced in the Netherlands.

Agri-business is one of the driving forces behind the Dutch economy and makes up approximately 10 percent of the Dutch economy. The sector has a strong international focus and accounts for almost 15 percent of the Netherlands' total export value.

Due to its large and sophisticated processing industry, the Netherlands increasingly depends on stable supplies of bulk, intermediate and also consumer oriented products (e.g. grains, seafood, fresh produce, nuts, meat, specialty products, etc.) from other EU member states and third countries.

The Netherlands continues to be a leading trading nation; it is after the U.S. and Germany the largest exporter and the 6th largest importer of agricultural products in the world. Belgium is after the 9th largest exporter and the 9th largest importer of agricultural products in the world.

Developments and Trends That Affect the HRI Industry

Because of the current crisis consumers are not spending but rather saving money and one way of doing that is cutting expenditures on eating out. If consumers go out they carefully check prices and more than ever seek value for money.

The population in the Benelux is graying. The age groups 55-75 years old are quite outgoing and often enjoy a good pension. Households that have two incomes also continue to grow, especially in the age groups 25-45. Households are also becoming smaller. Finally the ethnic minority groups continue to grow. All developments offer new opportunities for entrepreneurs in the foodservice industry.

Industry analysts believe the Benelux foodservice sector is entering a new phase of development and it is generally believed that within the next two decades, the industry profile will change to accommodate fewer small operators and more medium and large establishments. Industry shakeups will occur, with more mergers and acquisitions or strategic alliances, and branding success. In addition, there is still growth for unique, independent, high-end restaurants.

Lines between Out-Of-Home and At-Home are blurring. Leading (food) retailers are increasingly offering places where customers can enjoy the food they just bought or even order meals. At the same time traditional foodservice outlets are tapping into the retail market by selling specialty products for At-Home. Some of the retailers that have entered the foodservice market and claimed prominent positions include V&D, HEMA, IKEA, Makro and Jumbo.

Consumer tastes are becoming more international. The number of Indian, Thai and Indonesian outlets continues to grow. Strict eating times are changing, leading to an increasing in snacking on the go. Finally consumers are moving to healthier eating habits, while sustainability is used to meet the consumers' concerns about environment, obesity and animal welfare.

On-line shopping offers potential for food products albeit the market currently is still very small (around 1 percent). It especially offers opportunities for the food retail market, for more information please read the following GAIN report NL2014.

Advantages and Challenges

Sector Strengths & Market Opportunities:

- The industry is very fragmented (often family run businesses) and can therefore adjust itself easily to the changing consumer demands.
- The Benelux consumer is curious and wants to try new things; this creates opportunities for new products and service concepts.
- U.S. products enjoy a positive image among the Dutch and Belgian population.
- When compared to the U.S. and some European markets, the Benelux foodservice industry has the opportunity to enhance its share of total food sales.
- The majority of the Benelux foodservice industry is indifferent about sustainability certification.

Sector Weaknesses & Competitive Threats:

- The current economic crisis is expected to continue to hit the foodservice hard.
- The small cafés that are especially affected greatly by the smoking ban face an uncertain future.
- Strict import regulations, including the labeling requirements
- Competition from many ethnic restaurants, including, Italian, Indonesian, Chinese, Spanish, Thai, etc.
- In general the margins on food at foodservice outlets are thin, the margins on beverages (including wines and beer) are much better.

Section II. ROAD MAP FOR MARKET ENTRY

Entry Strategy

Prior to any export, FAS/The Hague suggests U.S. companies invest in research analyzing the Benelux food culture (concepts, flavors, price, and product requirements). Some of the State Regional Trade Groups offer this type of research (Food Exports' market scan and market builder program). Once the product has been chosen, be aware of fierce competition from not only EU suppliers but also those from outside the EU.

There are several tariff and non-tariff trade barriers that complicate export to the Benelux countries. An experienced and specialized importer knows the industry, the dynamics, the trade barriers and the required documentation. In addition, the Office of Agricultural Affairs in The Hague (OAA) offers guidelines on import regulations for food products that can be found on <http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20-%20Narrative%20The%20Hague%20Netherlands%203-8-2013.pdf> (the Netherlands) and <http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20-%20Narrative%20The%20Hague%20Belgium-Luxembourg%203-8-2013.pdf> (Belgium).

Participating in trade shows in Europe (like SIAL, Anuga, ESE, etc.) is a proven way to find the right importer and also facilitates the direct contact with distributors and wholesalers. An overview of all USDA endorsed trade shows in Europe can be found at http://www.fas.usda.gov/agx/trade_events/trade_events.asp and www.usda-mideurope.com. U.S. cooperators often can help promoting your product in Europe, an overview of U.S. cooperators can be found at <http://www.fas.usda.gov/pcd/PartnersSearch.aspx>. Be aware that not all U.S. cooperators have programs for the European market.

Market Structure

- The Benelux fast-food sector and Catering sector are highly consolidated, dominated by a few international and national players.

Figure 5: Leading fast-food companies in the Benelux



Top 5 largest fast food companies in the Netherlands

	Name	Turnover in \$ ² (2012 figures)
1	McDonalds	854
2	Burger King	115
3	Domino's Pizza	68
4	New York Pizza	57
5	Febo	46

Source: Misset Horeca

Figure 6: Leading caterers in the Benelux



Top 10 largest catering companies in the Netherlands

	Name	Turnover in \$ ³ (2012 figures)
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² 1\$=0.758€

1	Sodexo	435
2	Albron	423
3	Compass Group	376
4	Paresto	119
5	Vermaat Group	86
6	Jaarbeurs Catering Services	81
7	Koninklijke Van Den Boer Group	79
8	Hutten Catering	57
9	Prorest Catering	53
10	OSP Catering	53

Source: Misset Horeca

- Except for the hotel en restaurant chains, most other consumer foodservice sub-sectors are highly fragmented. Often restaurants and more so cafés are independently operated companies with their own purchase patterns and buyers.
- As the chart on the next page indicates, small and independent entrepreneurs buy their products and ingredients from wholesaler/distributors. There are approximately 10 wholesalers in the Benelux. The leading ones are indicated below.

Figure 7: Leading wholesalers/distributors in the Benelux

- Deli XL
- Kweker
- MAXXAM/VHC
- Hanos
- Sligro
- ISPC
- Makro/Metro
- Hocras
- Kruidenier

Source: FAS/The Hague

Figure 8: Distribution Channel Flow Diagram



Source: FAS/The Hague

- Some companies in the foodservice industry purchase imported products directly from specialized importers but in general they buy via wholesalers or local suppliers.
- Fast-food companies are frequently part of a large chain with national, regional or global presence. Products are delivered through proprietary distributors, who normally purchase products for all franchisees.

³ 1\$=0.758€

- Due to its consolidated structure, the Benelux catering sector has a limited number of dedicated distributors. Distributors buy directly from producers. Non-EU products are bought through importers.
- Independent restaurants, bars and takeaways buy fresh products (meat, seafood, dairy products, bread and fruits & vegetables) often from local suppliers who in some cases produce those products themselves. These relationships are in most cases personal relationships between the owner of the restaurant and the supplier. For all other products (and non-food) the independent owner generally goes to a wholesaler, except for beer, wine and soft drinks which are delivered. Wholesalers try to become a one-stop-shop point for their clients by expanding specifically in fresh products and beverages.
- For bigger restaurants and/or restaurant chains, there are different players in the supply chain. Local suppliers are not competitive and are replaced directly by wholesalers and distributors.

Sub Sectors Profiles

Top 10 largest foodservice companies in the Netherlands

	Name	Turnover in \$4 (2012 figures)	Sub sector
1	McDonalds	854	Fast food
2	Van Der Valk	711	Hotel/full service restaurants
3	NS Station Retail bedrijf	455	Street stalls/Kiosks
4	Landal Greenpark	346	Full service restaurants
5	La Place (V&D)	297	Self service cafeteria
6	NH Hotels	292	Hotel/full service restaurants
7	Accor Hotels	286	Hotel/full service restaurants
8	Hampshire hospitality	261	Hotel/full service restaurants
9	Louvre Hotel group	198	Hotel/full service restaurants
10	Best Western	156	Hotel/full service restaurants
11	HMS host Schiphol	139	Self service cafeteria
12	Fletcher Hotels	132	Hotel/full service restaurants
13	Intercontinental Hotels	132	Hotel/full service restaurants
14	Hilton Hotels	117	Hotel/full service restaurants
15	Burger King	115	Fast food

Source: Misset Horeca

Section III. COMPETITION

This section summarizes the overall competitive situation that U.S. suppliers face in the food service market and their market share. In addition the strengths of the key supplying countries and the advantages and disadvantages of local suppliers are discussed per product category.

Figure 9: competition, the Netherlands

Product Category,	Major Supply Sources	Strengths of Key Supply Countries	Advantages and Disadvantages of local suppliers
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⁴ 1\$=0.758€

Wine Total Imports: 1,114 million \$	France (38%) Germany (10%) Spain (9%) Italy (8%) USA (3%)	Good quality Export tradition/experience Proximity Popular holiday destination	No real commercial availability in the Benelux
Sauces, condiments and seasonings HS 210390 Total imports: 250 million \$	Germany (25%) Belgium (14%) Italy (10%) France (8%) USA (2%)	Unique products Excellent quality/taste Availability	The U.S. enjoys a good reputation, identification way-of-life, and unique products.
Pulses Group 48 Total imports: 91 million \$	Russia (17%) China (16%) USA (11%)	Peas in the Netherlands mainly come from Russia while the U.S. has a strong position in exporting kidney beans. Canada dominates Dutch imports of lentils	No or not enough local supply. The trend towards eating healthier food and experimenting with international cuisines is driving demand for pulses.
Tree nuts Group 20 Total imports: 763 million \$	USA (26%) Vietnam (24%) India (9%) China (5%)	The U.S. dominates the international trade in almonds and pistachios	No local supply. The Dutch food processing depends on almonds from Spain and the U.S. The production in the U.S. continues to grow and increasingly supplies Europe with high and consistent quality of almonds. China, Iran and the U.S. are all suppliers of pistachios to the Dutch market.
Beef Total imports: 1,913 million \$	Germany (16%) Poland (10%) Belgium (10%) UK (9%) USA (5%)	The Dutch meat processing industry and also the high-end foodservice industry depends on imports. EU suppliers benefit from proximity. The U.S., Brazil and Argentina benefit from excellent quality beef.	Dutch beef is of much lower quality than U.S. beef. The beef from the U.S. is known for its consistency in quality and cuts (famous breeds like Black Angus and Wagyu), its taste and intramuscular fat (grain fed).
Seafood Total imports: 2,922 million	Germany (13%) Iceland (12%)	Iceland and to a lesser extent Russia, Norway and China are suppliers of cod; Vietnam dominates the trade in pangasius; the U.S. leads the supply of	Frozen fillets of white fish need to be sourced outside the EU. The Dutch also depend on non-EU markets for salmon, coquilles and

\$	Belgium (7%) Iceland (6%) China (5%) USA (3%)	Alaska Pollack. Bangladesh and India are the Netherlands' leading suppliers of shrimps and prawns.	shrimps and prawns.
Snack foods Total imports: 1,166 million \$	Belgium (37%) Germany (28%) Italy (7%) UK (6%) USA (1%)	Unique products and excellent quality and taste	The U.S. offers unique and innovative products. Transportation costs and time and also EU import regulations and tariffs hamper.
Fresh fruit Total imports: 4,202 million \$	South Africa (18%) Chile (11%) Spain (10%) Brazil (7%) USA (1%)	Southern hemisphere countries complement local fresh fruit production.	Citrus and exotic fruit are locally not available.

Source: Globe Trade Atlas

Figure 10: competition, Belgium

Product Category,	Major Supply Sources	Strengths of Key Supply Countries	Advantages and Disadvantages of local suppliers
Fresh fruit Total imports: 2,842 million \$	Colombia (19%) Ecuador (12%) Costa Rica (11%) Spain (11%) USA (1%)	Southern hemisphere countries complement local fresh fruit production and supply product locally not available.	Citrus and exotic fruit are locally not available.
Wine Total Imports: 1,247 million \$	France (61%) Spain (9%) Italy (8%) Portugal (4%) USA (1%)	Good quality Export tradition/experience Proximity Popular holiday destination	No real commercial availability in the Benelux

Snack foods Total imports: 1,378 million \$	Netherlands (31%) France (23%) Germany (20%) Italy (7%) UK (4%) USA (1%)	Unique products and excellent quality and taste	The U.S. offers unique and innovative products. Transportation costs and time and also EU import regulations and tariffs hamper.
Pulses Group 48 Total imports: 88 million \$	France (44%) Netherlands (13%) Canada (10%) China (10%) USA (4%)	Imports from France and Netherlands are re-exports. Peas in Belgium mainly come from China while the U.S. has a strong position in exporting kidney beans. Canada dominates imports of lentils	No or not enough local supply. The trend towards eating healthier food and experimenting with international cuisines is driving demand for pulses.
Tree nuts Group 20 Total imports: 364 million \$	USA (29%) Netherlands (16%) Turkey (9%) France (7%)	The U.S. dominates the international trade in almonds and pistachios.	No local supply. The Belgian food processing depends on almonds from Spain and the U.S. The production in the U.S. continues to grow and increasingly supplies Europe with high and consistent quality of almonds. The U.S. is also a leading supplier of pistachios to the Dutch market.
Sauces, condiments and seasonings HS 210390 Total imports: 160 million \$	Netherlands (32%) France (18%) Germany (15%) UK (7%) Italy (7%) USA (2%)	Unique products Excellent quality/taste Availability	The U.S. enjoys a good reputation, identification way-of-life, and unique products.
Beef Total imports: 386 million \$	Netherlands (26%) France (20%) Ireland (13%) Germany (12%) USA (2%)	The Belgian meat processing industry and also the high-end foodservice industry depends on imports. EU suppliers benefit from proximity. The U.S., Australia and New Zealand benefit from excellent quality beef.	Local beef is of much lower quality than U.S. beef. The beef from the U.S. is famous for its consistency in quality and cuts (known breeds like Black Angus and Wagyu), its taste and intramuscular fat (grain fed).

Section IV. BEST PRODUCT PROSPECTS

Products that meet one or more of the following criteria have the best prospect to be sold on the Dutch and Belgian market. 1. Products (innovative, price, packaging, taste, size) that are unique to the U.S.; 2. Products those are not sufficiently available in the Benelux market and 3. Products that are available during the off season in the Benelux (often fresh products).

Products Present in the Market Which Have Good Sales Potential

- Nuts: almonds, peanuts, pistachios, walnuts, hazelnuts, pecans;
- Seafood: Alaska pollack, salmon cod, halibut, scallops, lobster, etc.;
- Fresh fruit and vegetables: sweet potatoes, grapefruit, Minneola, cranberries, etc.;
- Fruit juice concentrates: orange juice, cranberry, grapefruit;
- Sauces, snacks and condiments;
- Bourbons and orange bitter;
- California wines;

Products Not Present in Significant Quantities, but Which Have Good Sales Potential

- Wines from other States ;
- Dried peas and lentils;
- Micro breweries' beers;
- Healthy food, organic food and sustainable food;
- Sweet corn;
- Guavas and cherries;

Products Not Present Because They Face Significant Barriers

- Specialty products containing GMO derived ingredients;

Figure 11: Table Best Product Prospects for the Netherlands

Product category	Total Netherlands imports, \$ million	Netherlands imports from the U.S., \$ million	2008-2012 Average annual import growth	Key constraint over market development	Market attractiveness for U.S.
Snack foods	1,166	15	25 %	Competition from suppliers from EU countries. Transportation costs/time, EU import tariffs, and GMO contents.	Unique products, excellent quality and taste.
Beef	1,913	98	31 %	Competition from South America, Australia/New Zealand and Ireland. Price, EU import	Strong demand in high-end HRI industry. Growing awareness at mainstream HRI

				requirements and unfamiliarity of less familiar cuts.	level and specialty retail outlets.
Fresh vegetables	1,822	3	11 %	Unfamiliarity how and when to use sweet corn and sweet potatoes.	The U.S. provides consistent and good quality vegetables.
Tree nuts	763	201	11 %	The U.S. dominates the market	Strong demand from the food processing and snack industry.

Figure 12: Table Best Product Prospects for Belgium

Product category	Total Belgian imports, \$ million	Belgian imports from the U.S., \$ million	2008-2012 Average annual import growth	Key constraint over market development	Market attractiveness for U.S.
Breakfast cereals / pancake mix	146	0.2	127 %	Competition from suppliers from EU countries. Transportation costs/time, EU import tariffs, and GMO contents.	Unique products, excellent quality and taste.
Fresh fruit	2,842	15	1 %	Competition from other suppliers (except for cranberries).	Growing demand for grape fruits, guavas, cherries and cranberries.
Fruit and vegetable juices	908	51	32 %	Competition from Brazil.	Growing demand for orange and grape fruit juices
Wine and beer	1,674	8	72 %	Competition from other new world wines producers like South Africa, Australia, etc.	Strong demand for new world wines

The exact import tariff rate based on product code can be found at <http://www.usda-eu.org/trade-with-the-eu/tariffs/eu-import-duties/>.

Section V. POST CONTACT AND FURTHER INFORMATION

If you have questions or comments regarding this report, or need assistance exporting to the Benelux, please contact the Agricultural Specialist at the U.S. Office of Agricultural Affairs in The Hague, the Netherlands:

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